SYSTEM: Ombudsman Case Tracking System 2.0
SCRIPT NAME: User Acceptance Test (UAT) Script
TEST 2:   **Working a Case**

Scope:

The OCTS 2.0 application provides the SFA Ombudsman the ability to review and update case information for the purpose of resolving request for assistance from customer. This test case validates the tasks associated with working an existing case. The following scenarios will be executed:

- Review your assigned cases
- Add an activity based on interaction with the customer
- Add an activity based on interaction with a partner
- Update demographic information
- Add an issue to a case
- Attach a document to a case or activity

**Exclusions/
Limitations:**

- SIT/UAT does not have the capability of performing a stress test on the OCTS 2.0 program. The number of transactions staged for SIT/UAT conditions will represent only a small fraction of the production-size data.

Control:

Testing Site: Testing will take place at the ROB-3 site. The On-site Test Lead will:

- facilitate the test execution,
- collect change requests from the Users executing the test,
- enter the change control requests in to the MS Access System Investigation Request Tool,
- assign a priority level to each request,
- coordinate modifications with the development team,
- and coordinate regression testing with the User Test Team.

Conditions:

- Review your assigned cases
- Add an activity based on interaction with the customer
- Add an activity based on interaction with a partner
- Update demographic information
- Add an issue to a case
- Attach a document to a case or activity

Operations:

Input data will be staged using a Microsoft Excel Tool. After logging on to the Siebel test region, the tester will manually enter the staged data utilizing the following method:

- The tester will navigate through the OCTS 2.0 screens in order to enter the data in the appropriate areas.

Results:

The test team will review results on-line.

Inputs:
The following excel files contain the test data:

working case data [].xls

where [] = 0,1,2,…10

Outputs:

The output will be stored in the Test Database.

Reviewing Your Assigned Cases

Procedures/Script:

Scenario 1: Reviewing Your Assigned Cases

INIT	STEP	ACTION/INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon.	
	2	Navigate to the Cases Tab, All Cases View.	The view "All Cases" is visible. In the top half of the view a list applet detailing cases is visible. When first entering this view, the top record in this list applet is selected (has a > cursor on the left most column). In the bottom half of the view a form applet detailing the information for the Case selected in the list applet is visible. The New, Copy, Cancel, and Assign buttons are enabled. The Delete button is not enabled.	
		Click on the New Query button on the tool bar at the top.	The Case list applet at the top is blank.	
		Click in the Account field and enter the SSN of the case you want to work on. Hit Enter.	The desired Case is displayed as a result of the query.	
	4	In the form applet at the bottom, go to the "Ombudsman" field.	The cursor is on the appropriate field.	
	5	Verify the status of the case is "Open."	The Status field has a value of "Open."	
	6	In the "Ombudsman" field, delete the value if there is one.	The "Ombudsman" field is blank.	

Reviewing Your Assigned Cases

INIT	STEP	ACTION/INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	7	Click on the Assign button.	The "Assign Employees" box is opened with a list of employees who can be assigned to this case based on Assignment Rules.	
	8	Click on any name in the box and click Assign.	The chosen employee's id is displayed in the "Ombudsman" field.	
	9	Click on the arrow on the "Ombudsman" field.	The "Pick Case Owner" box is opened, listing all employees.	
	10	Enter your last name in the "starting with" field. Hit enter.	Your name will be listed.	
	11	Make sure your name is highlighted and click Pick.	Your id is displayed in the "Ombudsman" field.	
	12	Navigate to the Cases Tab, My Cases View	The view "My Cases" is visible. In the top half of the view a list applet detailing cases is visible. When first entering this view, the top record in this list applet is selected (has a > cursor on the left most column). In the bottom half of the view a form applet detailing the information for the Case selected in the list applet is visible. The New, Copy, Cancel, and Assign buttons are enabled. The Delete button is not enabled.	

Reviewing Your Assigned Cases

INIT	STEP	ACTION/INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	13	On the List Applet, click on the hyperlink under Account for the case record you are working with.	This brings you to the Accounts Tab, Cases View. The top part of the view has an Account form applet while the bottom has a list applet containing all cases associated with this account.	
	14	Click the toggle button on the Account form applet on the top part of the view.	Another Account form applet is displayed with more demographic information.	
	15	Click on the Contacts View on the view bar.	This brings you to the Accounts Tab, Contacts View. The Account form applet is at the top of the view, and the bottom of the view contains a list applet of all Contacts associated with that Account.	
	16	Click on the Back button twice.	This takes you to the Cases Tab, My Cases View.	
	17	On the List Applet, click on the hyperlink under Case #.	This brings you to the Cases Tab, Activities View. This view shows the Cases form applet at the top and the Activities list applet at the bottom.	
	18	Click on the toggle button on the Activities list applet.	The Activities form applet is displayed in the bottom part of the view.	
	19	Click on the Next and Previous Record buttons on the tool bar to view all activities listed for this case.	Different values will be displayed in the Activities form applet as the buttons are clicked (if there is more than one activity record).	

Adding an Activity (Interaction with Customer)

Procedures/Script:

Scenario 2: Adding an Activity (Interaction with Customer)

INIT	STEP	ACTION/INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon.	
	2	Navigate to the Cases Tab, All Cases View.	The view "All Cases" is visible. In the top half of the view a list applet detailing cases is visible. When first entering this view, the top record in this list applet is selected (has a > cursor on the left most column). In the bottom half of the view a form applet detailing the information for the Case selected in the list applet is visible. The New, Copy, Cancel, and Assign buttons are enabled. The Delete button is not enabled.	
	3	Click the New Query button on the tool bar.	The list applet will be blank with the column "New" highlighted.	
	4	Click in the column for "Account" and enter the first few numbers of the account, including dashes, followed by an asterisk.	The cursor moves to the Account column and the search criteria is displayed.	
	5	Hit the Enter key.	The desired case or a list of cases that fit the criteria is displayed.	
	6	Click on the hyperlink in the Case # column of the case you want to select.	This brings you to the Cases Tab, Activities View. This view shows the Cases form applet at the top and the Activities list applet at the bottom.	

Adding an Activity (Interaction with Customer)

INIT	STEP	ACTION/INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	7	Click on the toggle button on the Activities list applet.	The Activities form applet is displayed in the bottom part of the view.	
	8	Click the New button in the Activities form applet.	"Case #" is automatically populated, "Last Name" and "First Name" are populated with the primary contact linked to the case, "Account" is automatically populated, "Assigned To" is populated with your id, "Planned Start" is populated with the system's date and time, "Actual Start" is populated with the system's date and time, "Due" is populated with the system's date. All other fields are blank. The cursor is on "Activity Type."	
	9	Hit F2 to view the picklist and arrow down to the appropriate activity type. Hit Enter.	The field is populated with the chosen value.	
	10	Hit Tab to navigate to the next field.	The cursor is on the field "Description."	
	11	Enter text to describe the activity.	The text is displayed in the description box, and the scroll bar can be used to view the entire text.	
	12	Hit Tab to navigate to the "Priority" field.	The cursor is on the field "Priority."	
	13	Hit F2 to view the picklist and arrow down to the appropriate value. Hit Enter.	The field is populated with the chosen value.	
	14	Hit Tab to navigate to the next field.	The cursor is on the field "Status."	
	15	Hit F2 to view the picklist and arrow down to the appropriate value. Hit Enter.	The field is populated with the chosen value.	
	16	Click on the field "Planned Start" and change the date and time.	The new date and time are displayed.	

Adding an Activity (Interaction with Customer)

INIT	STEP	ACTION/INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	17	Click on the field "Actual Start" and change the date and time.	The new date and time are displayed.	
	18	Click on the field "Status" and change the value to "Done."	The "Actual Completion" field is automatically populated with the system's date and time. The "Duration" field is automatically populated with the calculated time that it took to complete the activity.	

Adding an Activity (Interaction with Partner)

Procedures/Script:

Scenario 3: Adding an Activity (Interaction with Partner)

INIT	STEP	ACTION/INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon.	
	2	Navigate to the Cases Tab, All Cases View.	The view "All Cases" is visible. In the top half of the view a list applet detailing cases is visible. When first entering this view, the top record in this list applet is selected (has a > cursor on the left most column). In the bottom half of the view a form applet detailing the information for the Case selected in the list applet is visible. The New, Copy, Cancel, and Assign buttons are enabled. The Delete button is not enabled.	
	3	Click the New Query button on the tool bar.	The list applet will be blank with the column "New" highlighted.	
	4	Click in the column for "Account" and enter the first few numbers, including dashes, of the account followed by an asterisk.	The cursor moves to the Account column and the search value is displayed.	
	5	Hit the Enter key.	The desired case or a list of cases that fit the criteria is displayed.	
	6	Click on the hyperlink in the Case # column of the case you want to select.	This brings you to the Cases Tab, Activities View. This view shows the Cases form applet at the top and the Activities list applet at the bottom.	

Adding an Activity (Interaction with Partner)

INIT	STEP	ACTION/INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	7	Click on the toggle button on the Activities list applet.	The Activities form applet is displayed in the bottom part of the view.	
	8	Click the New button in the Activities form applet.	"Case #" is automatically populated, "Last Name" and "First Name" are populated with the primary contact linked to the case, "Account" is automatically populated, "Assigned To" is populated with your id, "Planned Start" is populated with the system's date and time, "Actual Start" is populated with the system's date and time, "Due" is populated with the system's date. All other fields are blank. The cursor is on "Activity Type."	
	9	Hit F2 to view the picklist and arrow down to the appropriate activity type. Hit Enter.	The field is populated with the chosen value.	
	10	Hit Tab to navigate to the next field.	The cursor is on the field "Description."	
	11	Enter text to describe the activity.	The text is displayed in the description box, and the scroll bar can be used to view the entire text.	
	12	Hit Tab to navigate to the "Priority" field.	The cursor is on the field "Priority."	
	13	Hit F2 to view the picklist and arrow down to the appropriate value. Hit Enter.	The field is populated with the chosen value.	
	14	Hit Tab to navigate to the next field.	The cursor is on the field "Status."	
	15	Hit F2 to view the picklist and arrow down to the appropriate value. Hit Enter.	The field is populated with the chosen value.	
	16	Hit Tab to navigate to the "Last Name" field.	The cursor is on the field "Last Name."	

Adding an Activity (Interaction with Partner)

INIT	STEP	ACTION/INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	17	Press the F2 key.	The Pick Contact applet appears.	
	18	Select "Account" from the picklist in the **Find** field. Enter the name of the partner entity in the **Starting With** field. Hit Enter.	The record does not exist in the database. As such, the Pick Contact Applet is blank	
	19	Click the New button at the bottom of the applet.	A blank record is opened.	
	20	In the "Contact Type" field, choose "Partner" from the picklist.	"Partner" is displayed in the "Contact Type" field.	
	21	In the "Relationship/Title" field, choose the appropriate value from the picklist.	The chosen value is displayed in the "Relationship/Title" field.	
	22	Tab to the "Account" field and press F2.	The Pick Account box is opened.	
	23	Click the New button at the bottom of the applet.	A blank record is opened.	
	24	Enter the partner's name in the "Account" field (not an SSN).	The value is displayed in the "Account" field.	
	25	Hit tab in order to navigate to the next field.	The cursor is in the "Account Type" field.	
	26	Hit F2 and choose "Partner."	"Partner" is the value in the "Account Type" field.	
	27	Hit Tab to navigate to the "Address" field.	The cursor is in the "Address" field.	
	28	Enter the address, city, state, zip, and country information.	Address data is stored in the appropriate fields.	
	29	Enter the name of the site in the "Site" field.	The value is displayed in the "Site" field.	
	30	In the "Contact Method" field, choose "Work Phone" from the picklist.	The chosen value is displayed in the "Contact Method" field.	
	31	Enter all phone numbers in the appropriate fields.	Phone number data is displayed in the appropriate fields.	
	32	In the "1st Email/Homepage" field, enter the web page address for the partner.	The web address automatically becomes a hyperlink when you click off the field.	

Adding an Activity (Interaction with Partner)

INIT	STEP	ACTION/INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	33	In the Comments field, enter any text needed related to the partner.	The text is displayed in the "Comments" field.	
	34	Ensure the account you just created is selected.	The account has a red arrow pointing to this record.	
	35	Click the Pick button at the bottom of the Pick Account box.	Data is appropriately copied in the contact record. The Pick Account box is closed and the Pick Contact box has focus.	
	36	Enter the Contact's Last Name and First Name.	The values are stored in the appropriate fields.	
	37	Enter any special notes about the partner in the "Special Notes/SME" field.	The data is displayed in the appropriate field.	
	38	Ensure the contact you just created is selected.	The contact has a red arrow pointing to this record.	
	39	Click the Pick button at the bottom of the Pick Contact box.	The "Last Name," "First Name," and "Account" fields contain the correct values.	
	40	Tab to the "Actual Completion" field.	"Actual Completion" field has focus.	
	41	Enter the correct date and time in the "Actual Completion" field.	The information is stored in the "Actual Completion" field and the "Status" field value is changed to "Done." The "Duration" field will automatically populate with the calculated time it took to complete the activity.	

Updating Demographic Information

Procedures/Script:

Scenario 4: Updating Demographic Information

INIT	STEP	ACTION/INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon.	
	2	Navigate to the Accounts Tab, All Accounts View.	The view "All Accounts" is visible. In the top half of the view a list applet detailing accounts is visible. When first entering this view, the top record in this list applet is selected (has a > cursor on the left most column). In the bottom half of the view a form applet detailing the information for the Account selected in the list applet is visible. The New, Copy, and Cancel, buttons are enabled. The Delete button is enabled if one of your accounts is highlighted.	
	3	Click the New Query button on the tool bar.	The list applet will be blank with the cursor in the column "Account."	
	4	Enter the account and hit Enter.	The appropriate account will be displayed in the list applet.	
	5	Ensure that the correct account is selected.	A red arrow is pointing to the correct account record.	
	6	Click on the Contacts View in the view bar.	The Accounts Tab, Contacts View is displayed with the Account toggle form applet at the top and the Contact list applet at the bottom.	
	7	Click on the toggle button at the top of the form applet.	The account form applet with address data is displayed.	
	8	Press the ellipsis button in the "Address" field.	The Account Addresses box will appear.	

Updating Demographic Information

INIT	STEP	ACTION/INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	9	Click the New button at the bottom of the Account Addresses box.	A blank record is opened.	
	10	Enter the new address data.	The data is stored in the correct fields.	
	11	Under the "Primary" column, click beside the new address.	A check mark appears beside the new address and the check mark is gone from the old address.	
	12	Click the Close button at the bottom of the Account Addresses box.	The box is closed and the new address data is displayed in the appropriate fields.	
	13	Change any other fields to update demographic information in the Account form applet at the top of the screen.	The account record is updated with new demographic information.	
	14	Select the corresponding Contact record in the Contact list applet.	A red arrow is pointing to the appropriate record.	
	15	Tab to the fields you updated in the Account record and make the same changes.	The Contact demographic data is updated.	

Adding Issues to a Case

Procedures/Script:

Scenario 5: Adding Issues to a Case

INIT	STEP	ACTION/INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon.	
	2	Navigate to the Cases Tab, All Cases View.	The view "All Cases" is visible. In the top half of the view a list applet detailing cases is visible. When first entering this view, the top record in this list applet is selected (has a > cursor on the left most column). In the bottom half of the view a form applet detailing the information for the Case selected in the list applet is visible. The New, Copy, Cancel, and Assign buttons are enabled. The Delete button is not enabled.	
	3	Click the New Query button on the tool bar. Click on the Account field.	The list applet will be blank with the cursor in the column "Account."	
	4	Enter the account and hit Enter.	The appropriate case will be displayed in the list applet.	
	5	Click in the "Revised Issue Category" in the form applet at the bottom of the screen.	The cursor is on the "Revised Issue Category" field.	
	6	Select the "Revised Issue Category" that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated with customer issues appears. After selecting a particular value the value appears in the "Revised Issue Category" field	
	7	Hit tab in order to navigate to the next field.	The cursor is in the "Revised Issue Sub-Category" field.	

Adding Issues to a Case

INIT	STEP	ACTION/INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	8	Select the "Revised Issue Sub-Category" that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values further describing the customer issue appears. After selecting a particular value the value appears in the "Revised Issue Sub-Category" field	
	9	Hit tab in order to navigate to the next field.	The cursor is in the "Revised Issue Summary" field	
	10	Enter the "Revised Issue Summary" information	The information is stored in this field. If the user clicks on the ellipsis button […] the entry window expands. The user can enlarge this window to view the entire entry.	
	11	Click on the Case Issues view on the view bar.	The Cases Tab, Case Issues View is displayed. The detail of the selected case is displayed in a form applet at the top of the screen with an Issue list applet at the bottom.	
	12	Press the Toggle button on the list applet at the bottom of the screen.	The Issue form applet is displayed.	
	13	Click on the New button.	A blank Issue record is opened. The "Issue #" field is automatically populated. The "Intake" field is populated with your id, and the "Date Received" field is populated with the system's date and time. The "Status" field is populated with "Open." The "Ombudsman" field defaults to the value of the "Ombudsman" field in the case record. "Sub-Status" defaults to "Assigned" if the "Ombudsman" field has a value.	
	14	Enter the correct data in the	The issue data is stored and	

		"Issue Category," "Sub Category," "Sub-Status," and "Summary" fields.	displayed in the appropriate fields.	

Attaching a Document to a Case or Activity

Procedures/Script

Scenario 6: Attaching a Document to a Case or Activity

INIT	STEP	ACTION/INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon.	
	2	Navigate to the Cases Tab, All Cases View.	The view "All Cases" is visible. In the top half of the view a list applet detailing cases is visible. When first entering this view, the top record in this list applet is selected (has a > cursor on the left most column). In the bottom half of the view a form applet detailing the information for the Case selected in the list applet is visible. The New, Copy, Cancel, and Assign buttons are enabled. The Delete button is not enabled.	
	3	Click the New Query button on the tool bar. Click on the Account field.	The list applet will be blank with the cursor in the column "Account."	
	4	Enter the account and hit Enter.	The appropriate case will be displayed in the list applet.	
	5	Click on the Attachments View on the view bar.	The Cases Tab, Attachments View is displayed. The details of the selected case are displayed in a form applet at the top of the screen with a list applet of attachments at the bottom.	
	6	Right-click in the Attachments applet at the bottom of the screen.	A menu will appear.	
	7	Click New Record.	The Select File box is opened.	

Attaching a Document to a Case or Activity

INIT	STEP	ACTION/INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	8	Click the arrow button in the "Look in" field and select the appropriate drive.	The selected drive is displayed in the "Look in" field and its contents are displayed in the box.	
	9	Locate the correct file and click on it.	The file name appears in the "File name" field.	
	10	Click the Select button.	The Select File box is closed and the attachment record has been created. The "Name," "Size," "Type," "Modified," and "Auto Update" fields are automatically populated. Cursor is in the "Name" field.	
	11	Click off the "Name" field.	The value in "Name" becomes a hyperlink.	
	12	Click the hyperlink under Name to launch the attached document.	The appropriate application is launched and the attached document is displayed.	
	13	Close the attachment.	The application that was launched is closed.	
	14	Right-click in the Attachments applet at the bottom of the screen.	A menu will appear.	
	15	Click New Record.	The Select File box is opened.	
	16	Enter a web site address in the URL field of the Select File box.	The address is displayed in the appropriate field.	
	17	Click the Select button.	The Select File box is closed and the attachment record has been created. The "Name" field is populated with the web site address and becomes a hyperlink when you click off this field.	
	18	Click off the "Name" field.	The value in "Name" becomes a hyperlink.	
	19	Click on the hyperlink under Name to launch the web site.	Internet Explorer (or another navigation application) is opened to the web site.	

Attaching a Document to a Case or Activity

INIT	STEP	ACTION/INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	20	Close the application.	The application that was launched is closed.	
	21	Navigate to the Activities Tab, All Activities View.	The view "All Activities" is visible. In the top half of the view a list applet detailing activities is visible. When first entering this view, the top record in this list applet is selected (has a > cursor on the left most column). In the bottom half of the view a form applet detailing the information for the Activity selected in the list applet is visible. The Cancel button is enabled. The New, Copy, and Delete buttons are disabled.	
	22	Click the New Query button on the tool bar. Click on the Account field.	The list applet will be blank with the cursor in the column "Account."	
	23	Enter the account and hit Enter.	The appropriate case will be displayed in the list applet.	
	24	Click on the Attachments View on the view bar.	The Activities Tab, Attachments View is displayed. The details of the selected activity are displayed in a form applet at the top of the screen with a list applet of attachments at the bottom.	
	25	Right-click in the Attachments applet at the bottom of the screen.	A menu will appear.	
	26	Click New Record.	The Select File box is opened.	
	27	Click the arrow button in the "Look in" field and select the appropriate drive.	The selected drive is displayed in the "Look in" field and its contents are displayed in the box.	
	28	Locate the correct file and click on it.	The file name appears in the "File name" field.	

Attaching a Document to a Case or Activity

INIT	STEP	ACTION/INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	29	Click the Select button.	The Select File box is closed and the attachment record has been created. The "Name," "Size," "Type," "Modified," and "Auto Update" fields are automatically populated. Cursor is in the "Name" field.	
	30	Click off the "Name" field.	The value in "Name" becomes a hyperlink.	
	31	Click the hyperlink under Name to launch the attached document.	The appropriate application is launched and the attached document is displayed.	
	32	Close the attachment.	The application that was launched is closed.	
	33	Right-click in the Attachments applet at the bottom of the screen.	A menu will appear.	
	34	Click New Record.	The Select File box is opened.	
	35	Enter a web site address in the URL field of the Select File box.	The address is displayed in the appropriate field.	
	36	Click the Select button.	The Select File box is closed and the attachment record has been created. The "Name" field is populated with the web site address and becomes a hyperlink when you click off this field.	
	37	Click off the "Name" field.	The value in "Name" becomes a hyperlink.	
	38	Click on the hyperlink under Name to launch the web site.	Internet Explorer (or another navigation application) is opened to the web site.	
	39	Close the application.	The application that was launched is closed.	